

FIG. 2

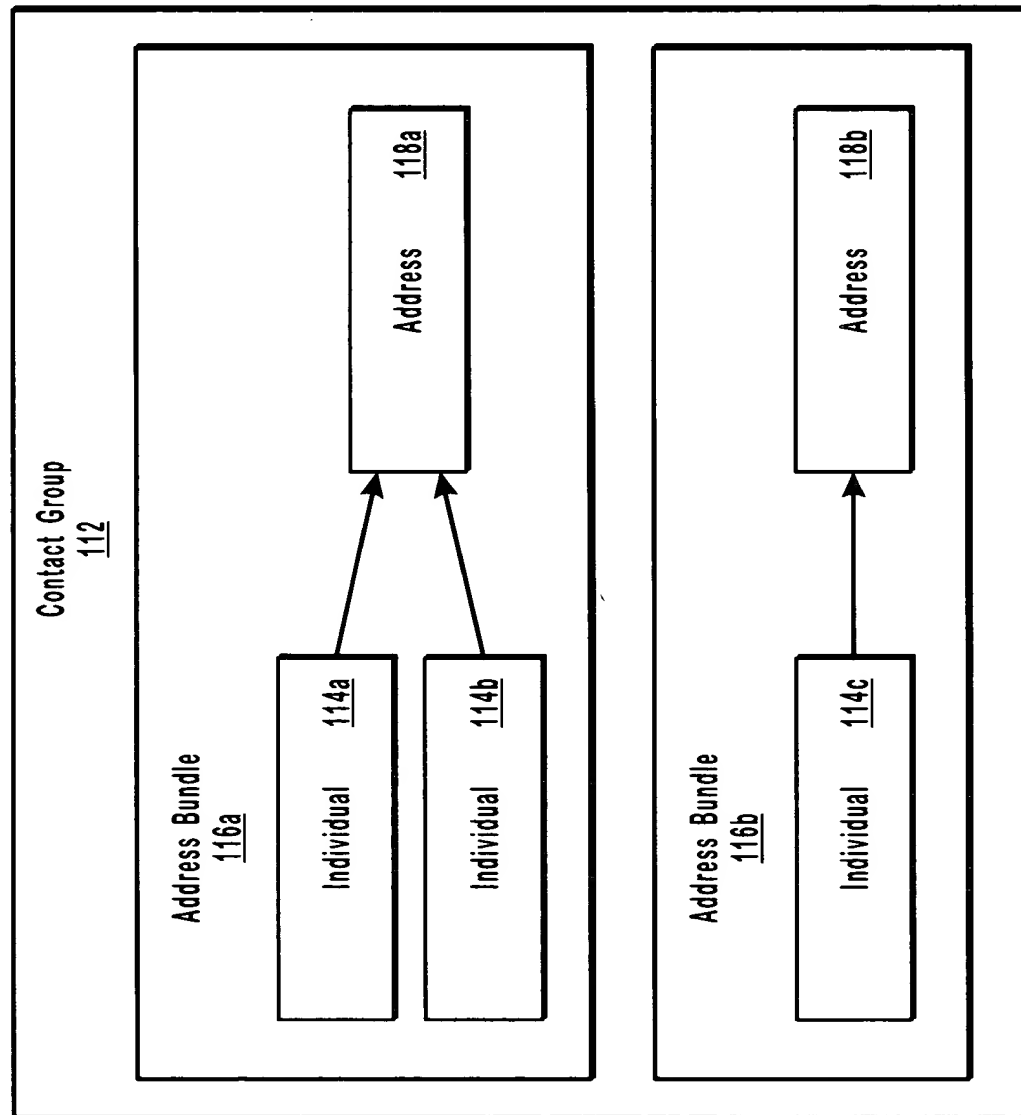


FIG. 3A

116

301

302

Address Bundle

Manual

Use Help Pages

Address Bundle

Curie-Clinic (Primary Business)

Curie-Laboratory

Curie-Clinic (Primary Business)

Primary Home

Dr. Pierre Curie, PhD

First Addressee

Second Addressee

Dr. Marie Sklodowska Curie

Salutation

Doctors Curie

Destination Override

The Radiology Institute of Utah 53

FIG. 3B

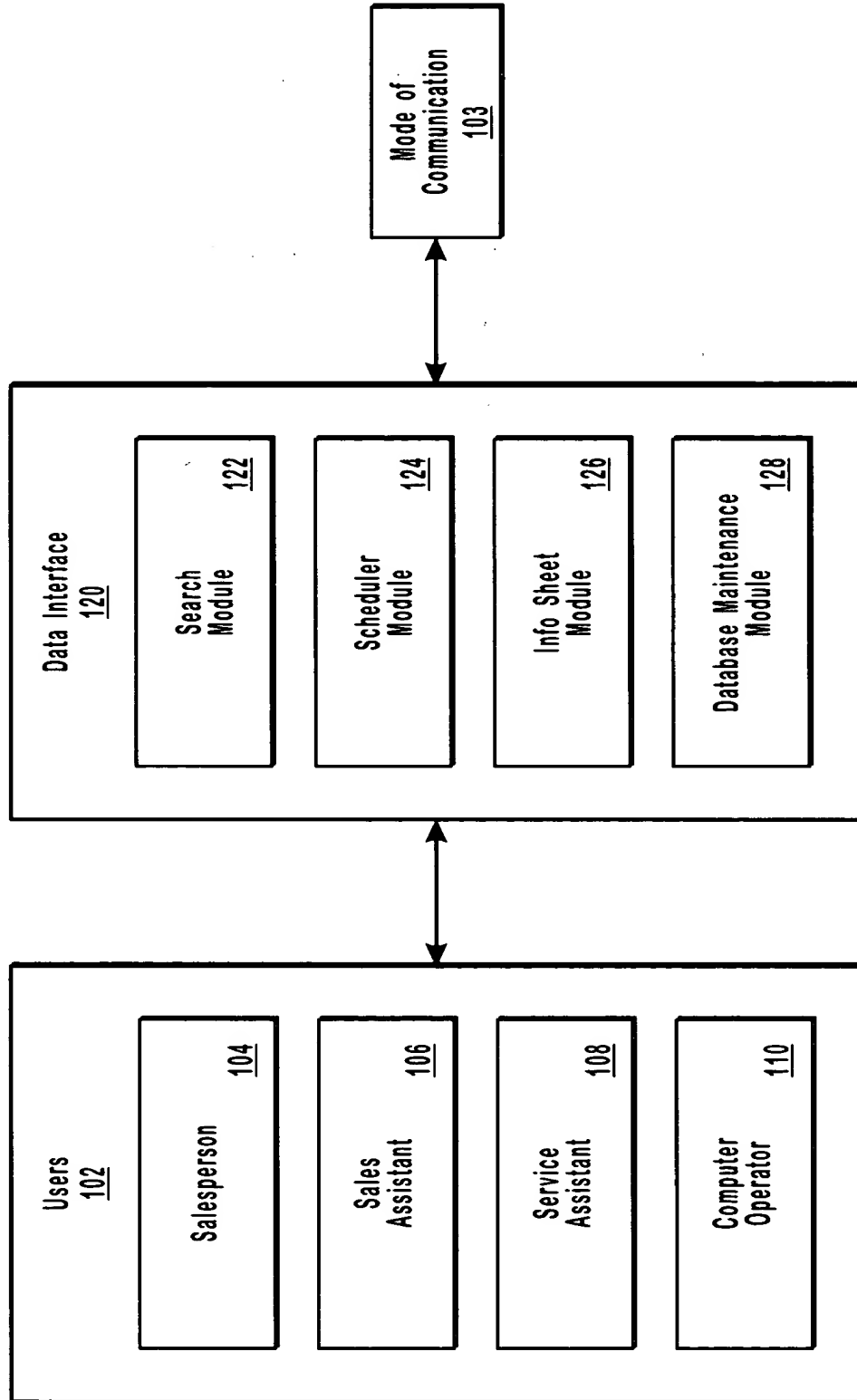


FIG. 4



FIG. 5



FIG. 6

T 03020 " 46900650

Go! 2.0 (Playground) Info Sheet: Alighieri/Portinari

File Messaging Tools Reports Campaigns Import & Export View Window Help

Search [] Record 1 of 52

Left Contact: Future Date [] PROSPECT [A - RESPONSIVE] 3:50:59M [TEACHER/CLERY] [NORMAL] [REFERRAL] 3/11/2010 [9:00] 9/27/2000 [3/11/2010] [No Contact Interval: 90] [Opportunity Review Interval: 180] [Letter] [auto-email] [update]

Individuals in Group
Mrs. Beatrice Portinari (Irish)
Prof. Dante Alighieri (Dante)

Group
Alighieri/Portinari
Salutation: Prof. Alighieri
www.west.edu/academics/faculty/alighieri.htm

History Individual Campaigns/Watchlists Opportunities Keywords Important Dates Sales Profile

File CALL ITEMS

3/4/2010 OPPORTUNITY Reducate Investment - JDS (02/17/2010)
5/28/2010 ACTION In-Office Appt. Begin implementing agreed plan. They're ready to; 1st CD (\$11k) matures today. - SAB (03/11/2010)
5/27/2010 ACTION Confirm In-Office appt. F. 5/28, 2 pm. Begin implementing plan-CD matured. - SAB (03/11/2010)
5/27/2010 ACTION For appt. tomorrow (or next work day), review Appointment Processing Checklist in folder. - REH (03/11/2010)
5/21/2010 LETTER SETUP Confirm Appointment - Written confirmation of appt. - Enableable.
3/11/2010 ACTION In-Office Appt. Review proposal. - REH (03/04/2010)
3/10/2010 NOTE Meeting - SAB - Completely approve proposal, but refuse to start implementing plan until first CD matures. They figure they'd better hang onto their whole small savings account "until we figure out the
3/10/2010 ACTION For appt. tomorrow (or next work day), review Appointment Processing Checklist in folder. - SAB (03/04/2010)
3/5/2010 LETTER SENT Confirm Appointment - Written confirmation of appt. - Enableable.
3/4/2010 ACTION In-Office Appt. Gather info. - SAB (02/17/2010)
3/4/2010 NOTE Meeting - JDS - Tish has been thoroughly frightened about their financial future. Their investments are virtually all fixed-income, come at busy rates and others at really busy rates. MW's assured them that
3/3/2010 ACTION Prepare Appointment Processing Checklist for In-Office appt. tomorrow (or next work day). - SAB (02/17/2010)
3/3/2010 ACTION Confirm In-Office Appt. Th. 3/4, 4 pm. gather info. - REH (02/17/2010)
2/25/2010 LETTER SENT Lead Processing-New Prospect-Ad-Hoc-In-Office Appt - Confirms In-Office appointment w/ Hot new Prospect. - Enableable.
2/17/2010 NOTE Outgoing Call - REH - Spoke to Dante's secretary; was expecting call. Checked Susie's spellings of both names with him; they ARE correct. Set appt. Th. 3/4, 4 pm.
2/17/2010 ACTION Call his referral. Referral is Susie Decatur. - SAB (02/12/2010)
2/12/2010 LETTER SENT Etiquette-Welcome-Referral - "Patsy" gave me your name." - Enableable.
2/12/2010 NOTE Incoming Call - SAB - Susie Decatur called. She's recommended us to Beatrice Portinari, her friend from many community activities. Tish's husband is Prof. Dante Alighieri. Both in their 50s and have been too
9/27/2000 LETTER SENT Service-Signature Required - Signature required message
9/27/2000 LETTER SENT Service-Signature Required-2nd Message - Signature required message

Speed Dial

Watch for it

Has Questions, Set Call action for...

No Answer/Message

Spoke w/ Decision Spoke w/ when facts

Spoke w/ Decision met if spoke w/ d.

Turned Over to RR "Watch for it" call...

LOCAL USER: conrad CAPS NUM IN: 500 1:30 PM 6/19/2001 Admin. QW

FIG. 7

Maintain Contact Group - Oldebucks, Velda				F6	
Contact Group					
Group Name Oldebucks, Velda	List				
Type Retired	No Contact Interval 30				
Source Walk-In	Wealth 1: Above \$500K				
Book C = Cautious	Opportunity Review Interval 180				
Communication Status Normal	Ready Funds				
First Contact Date 4/26/2010	Last Contact Date 2/22/2010				
Last Message Date 8/16/2000	Last Meeting Date 2/24/2010				
Last Opportunity Review Date 2/24/2010	<input type="checkbox"/> Default to Business Address				
Nickname Rights <input checked="" type="checkbox"/> FR	Keywords Harry Dent's Book				
Primary System Owner iqsellars	<input checked="" type="checkbox"/> SA				
Secondary System Owner sabrokerman	<input type="checkbox"/> SC				
	<input type="checkbox"/> SCA				
	<input type="checkbox"/> SMD				
	<input type="checkbox"/> Sif Min.				
Important Information					
<input type="button" value="Help"/> <input type="button" value="Close"/> <input type="button" value="Back"/> <input type="button" value="Next >"/>					

FIG. 8

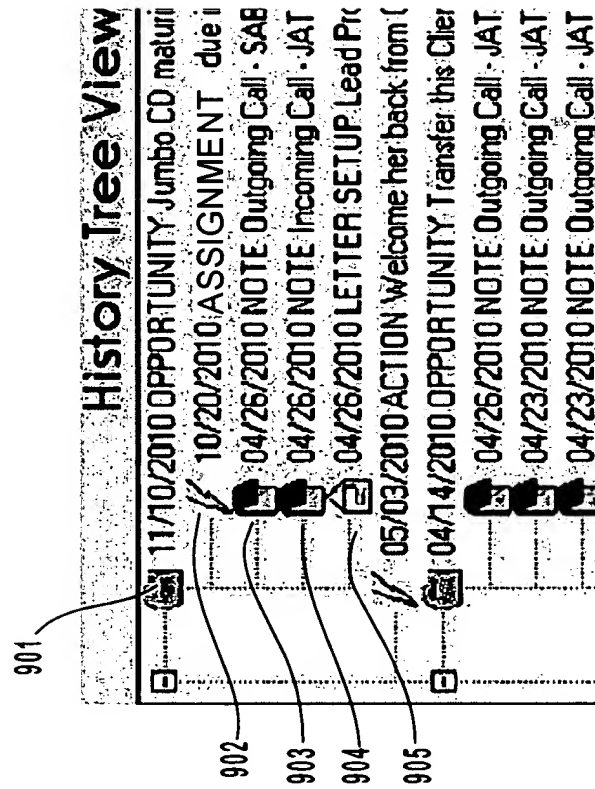


FIG. 9

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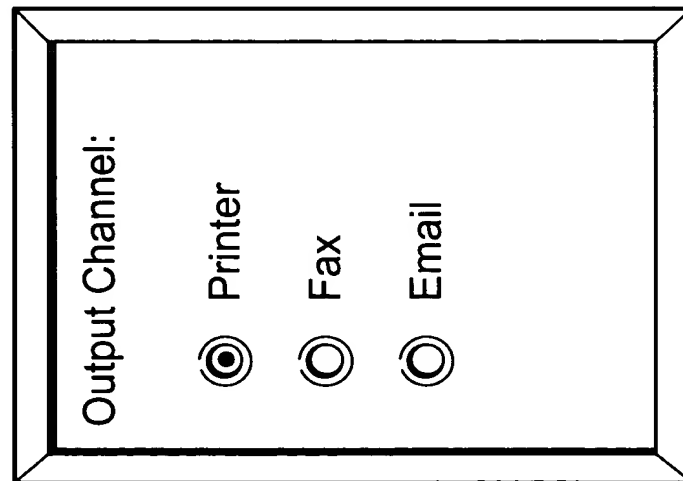


FIG. 10

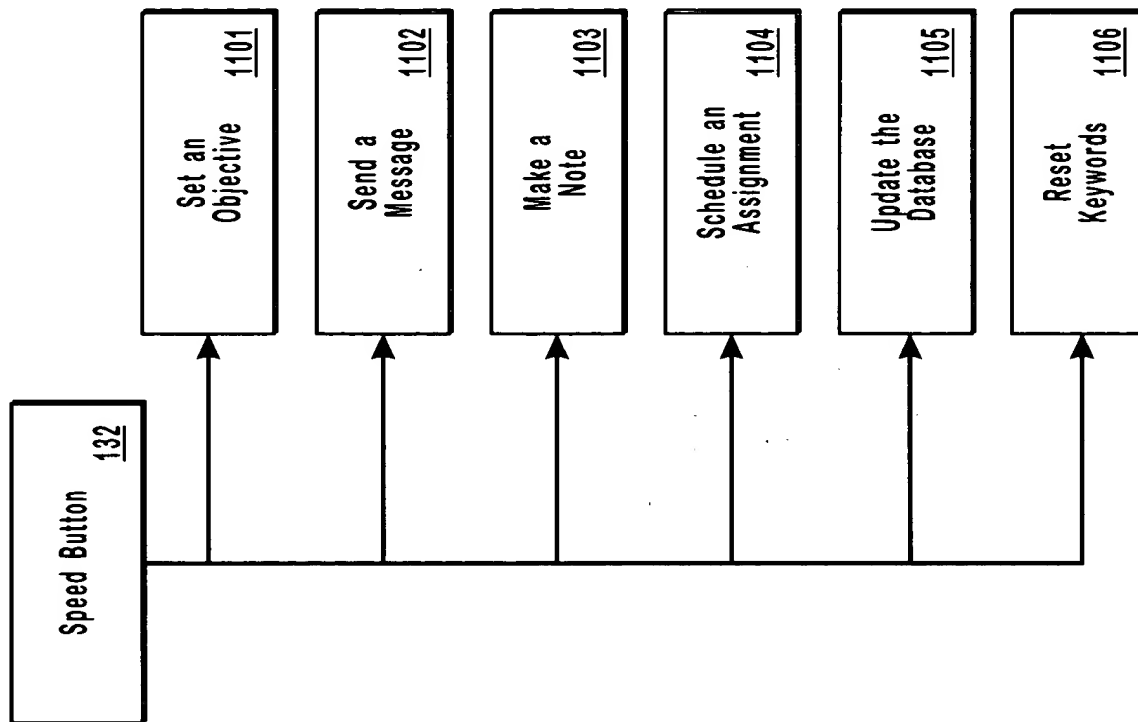


FIG. 11

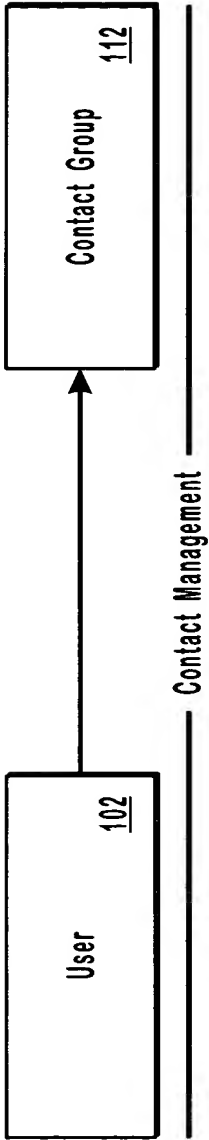


FIG. 13A

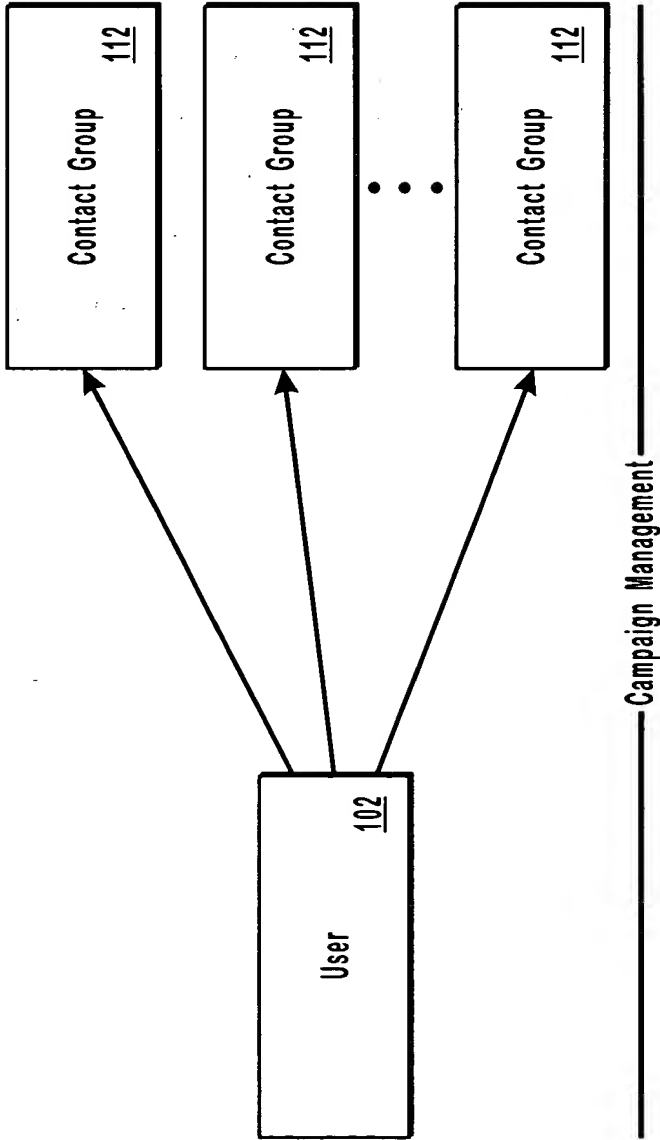


FIG. 13B

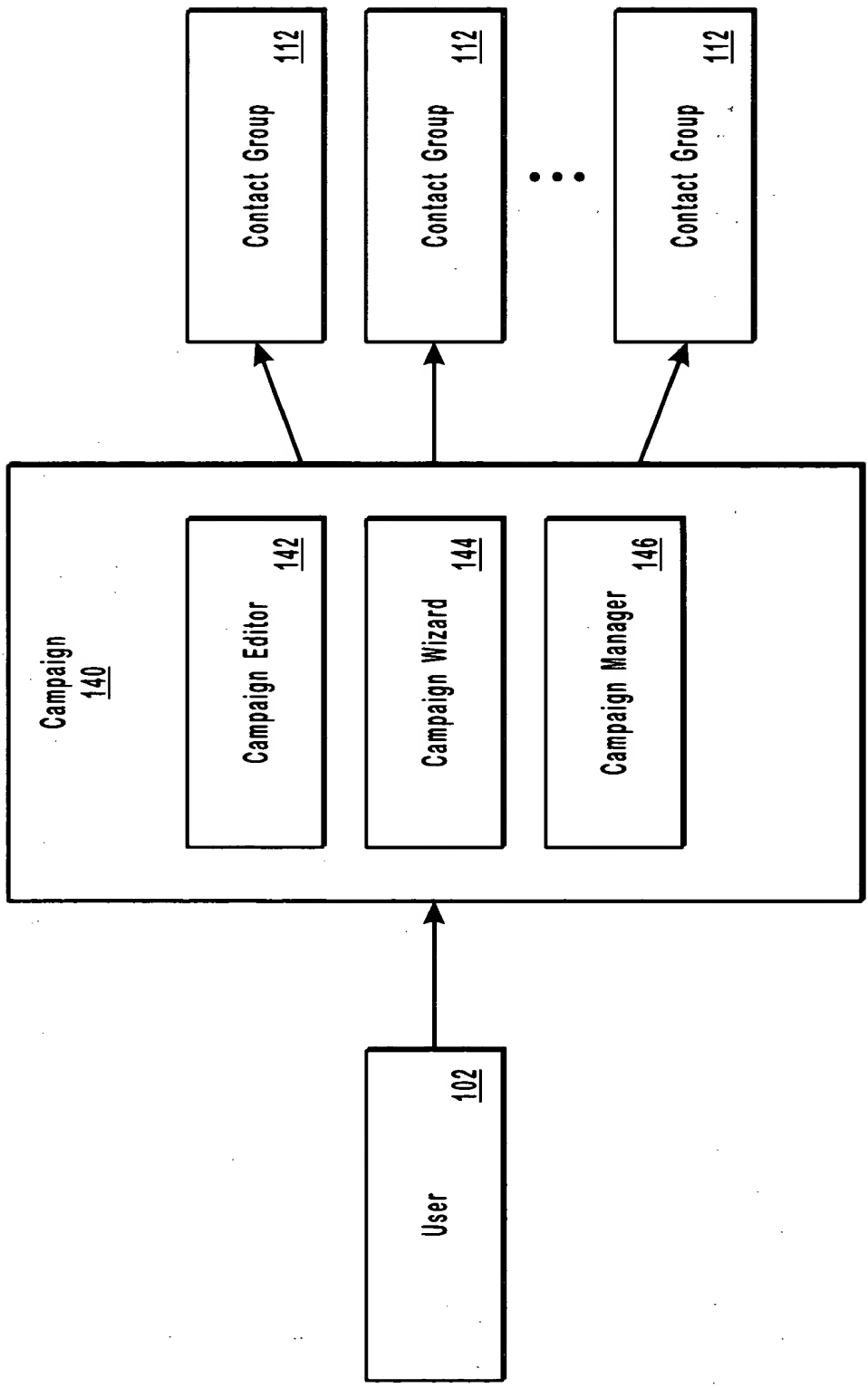


FIG. 13C

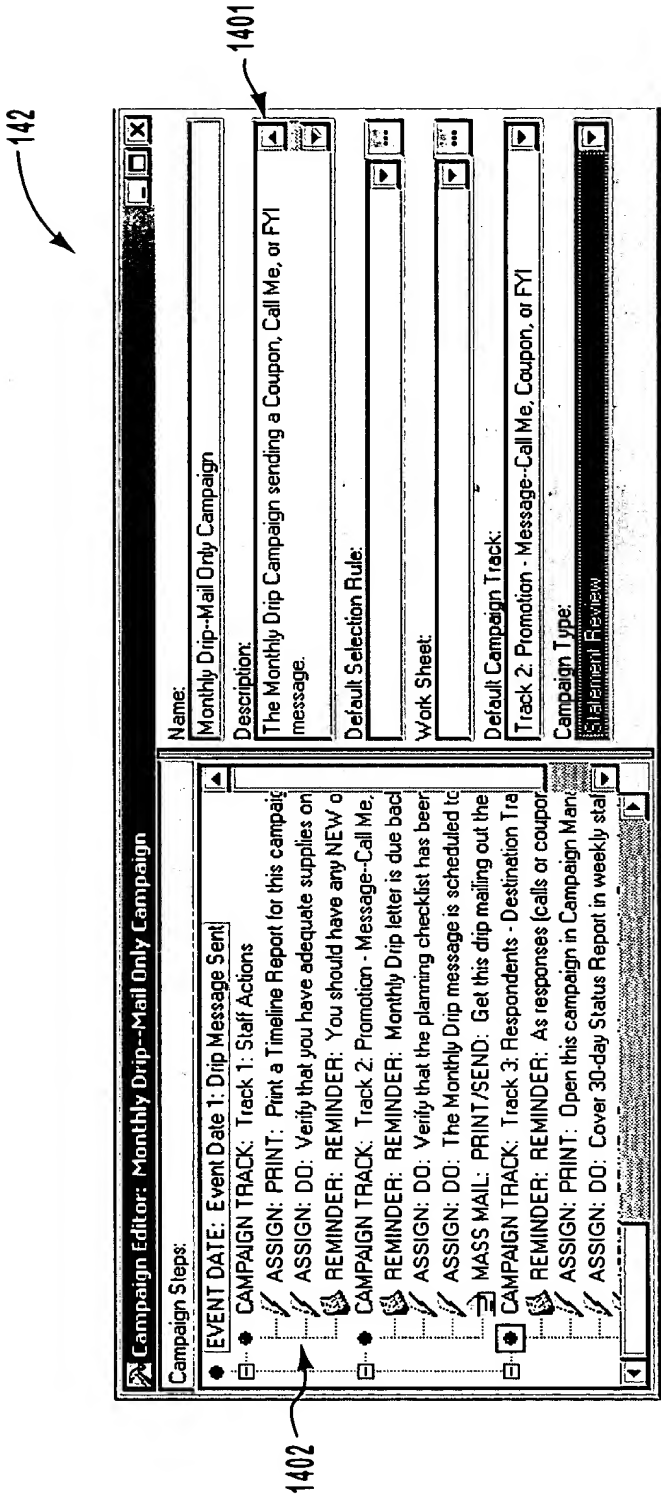


FIG. 14

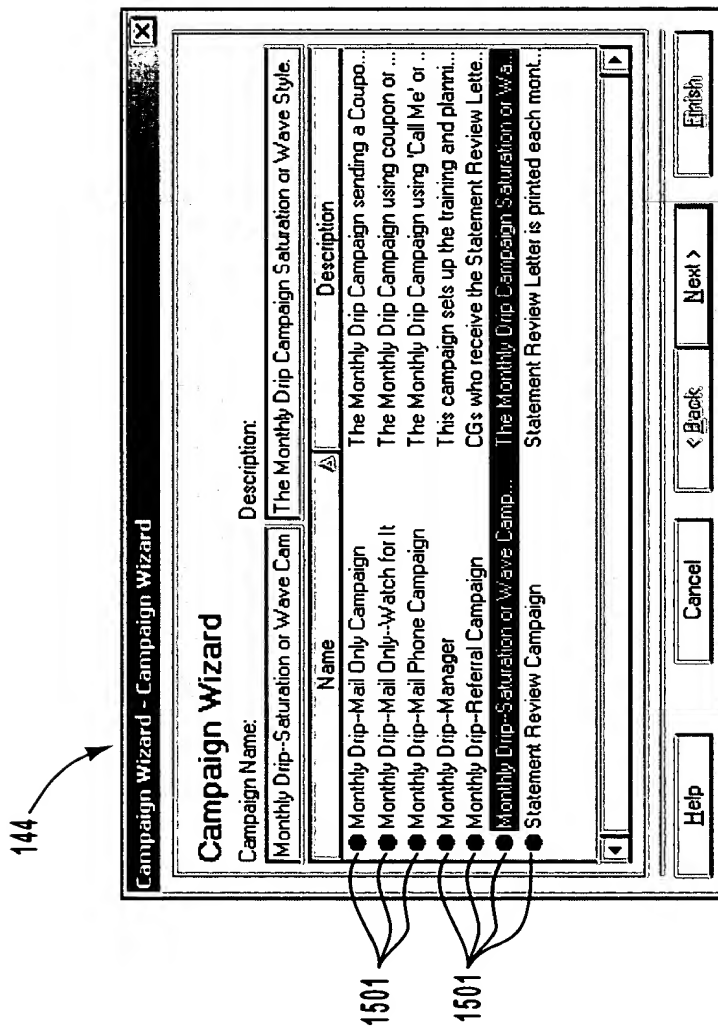


FIG. 15A

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Campaign Wizard - General Options

General Options

Selection Rule:
AA-Hot Clients

Team:
Sue & Jim's Team

Originator:
corwell

Campaign Post:	Staff Group:	Experience Level
CO	Sue & Jim's CO	Intermediate
RR	Jim RR	Beginner
SA	Sue & Jim's SA	Intermediate
SC	Sue & Jim's SV	Beginner
SCA	Sem Coordinator	Beginner
SMD	Sem Mktg Dir	Intermediate

Help

Cancel

< Back

Next >

Finish

FIG. 15B

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Campaign Wizard - Event Dates:

Event Dates:

Please fill in the dates for when each event in the campaign is supposed to begin.

Event Date:

Event Date 1: Drip Letter Mailed

Date:

08/11/2000

...

Help

Cancel

< Back

Next >

Finish

FIG. 15C

144

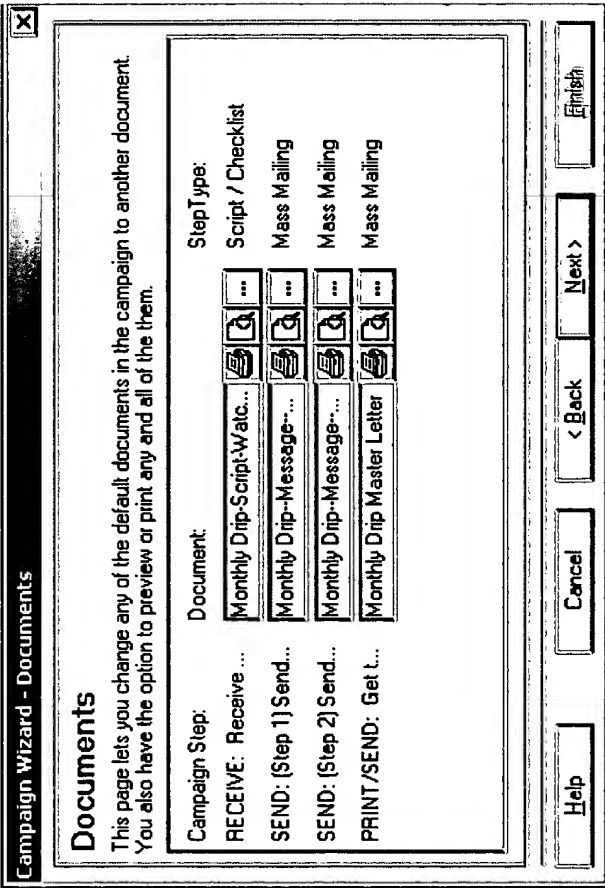


FIG. 15D

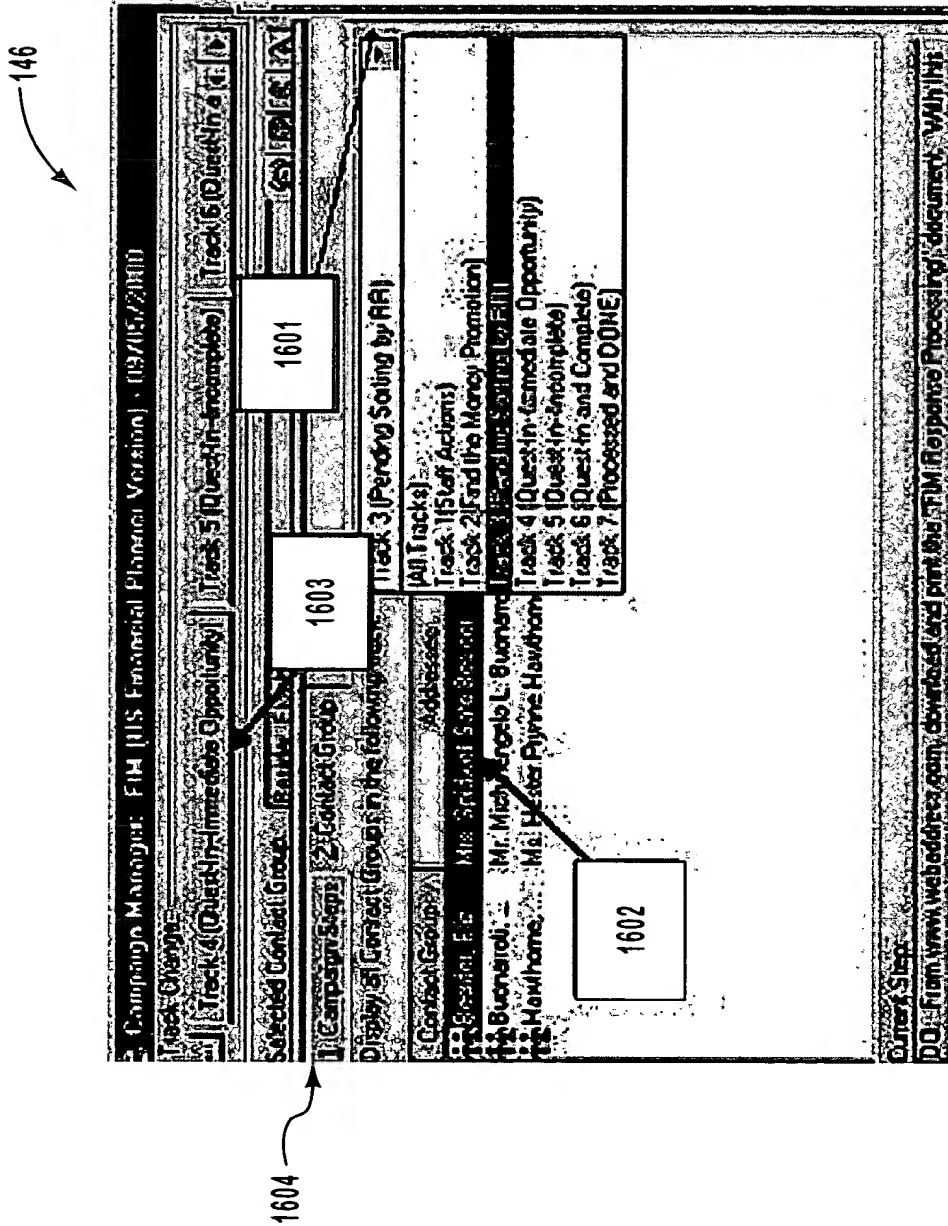


FIG. 16A

